



# TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

## EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for July 2003 was 5.4 percent, as shown in Treasure Valley Table 1. This was three-tenths of a percentage point above the June 2003 rate of 5.1 percent and two-tenths of a percentage point above the July 2002 rate of 5.2 percent. Month-over-month, the number of employed persons decreased by 1,900, or 0.8 percent, from June 2003, and the number of unemployed individuals increased by 600 individuals, or 4.8 percent. The decreasing number of persons employed and the increasing number of persons unemployed created an overall decrease of 1,300 individuals, or 0.5 percent, in the *Civilian Labor Force*, from June 2003. Year-over-year, the number of employed persons decreased by 7,900, or 3.3 percent, and the number of unemployed individuals decreased by 100 individuals or 0.8 percent, creating a net decrease in the *Civilian Labor Force* of 8,000 individuals from July 2002. The *Civilian Labor Force* figures for July 2003 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

In the Boise City MSA *Nonfarm Payroll Jobs* decreased by 1,400, or 0.6

Treasure Valley Table 2: July 2003 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	174,996	8,552	4.9	166,444
Adams	1,918	337	17.6	1,581
Boise	2,568	196	7.6	2,372
Canyon	68,368	4,486	6.6	63,882
Elmore	9,804	685	7.0	9,119
Gem	6,138	479	7.8	5,659
Owyhee	4,115	88	2.1	4,027
Payette	9,659	984	10.2	8,675
Valley	4,542	386	8.5	4,156
Washington	4,330	562	13.0	3,768
Statewide	688,884	38,737	5.6	650,147

Treasure Valley Table 1: Boise MSA Labor Force & Employment  
Ada and Canyon Counties

	July 2003*	June 2003	July 2002	% Change Last Month	% Change Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	243,300	244,600	251,300	-0.5	-3.2
Unemployment	13,000	12,400	13,100	4.8	-0.8
% of Labor Force Unemployed	5.4	5.1	5.2		
Total Employment	230,300	232,200	238,200	-0.8	-3.3
<b>Unadjusted</b>					
Civilian Labor Force	247,300	248,000	254,800	-0.3	-2.9
Unemployment	13,000	12,200	12,800	6.6	1.6
% of Labor Force Unemployed	5.2	4.9	5.0		
Total Employment	234,300	235,800	242,000	-0.6	-3.2
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs**</b>	227,400	228,800	229,500	-0.6	-0.9
<b>GOODS-PRODUCING INDUSTRIES</b>	45,900	45,800	48,400	0.2	-5.2
<b>Natural Resources &amp; Construction</b>	15,900	15,700	16,500	1.3	-3.6
<b>Manufacturing</b>	30,000	30,100	31,900	-0.3	-6.0
Durable Goods	22,900	23,000	24,900	-0.4	-8.0
Wood Product Manufacturing	2,000	2,000	2,000	0.0	0.0
Fabricated Metal Products Mfg.	1,400	1,500	1,500	-6.7	-6.7
Machinery Manufacturing	1,300	1,200	1,400	8.3	-7.1
Computer & Electronic Manufacturing	14,300	14,300	16,200	0.0	-11.7
Transportation Equipment Mfg.	1,600	1,600	1,700	0.0	-5.9
Other Durable Goods	2,300	2,400	2,100	-4.2	9.5
Nondurable Goods	7,100	7,100	7,000	0.0	1.4
Food Manufacturing	5,200	5,300	5,200	-1.9	0.0
Printing & Related Support Activities	700	700	800	0.0	-12.5
Other Nondurable Goods	1,200	1,100	1,000	9.1	20.0
<b>SERVICE-PROVIDING INDUSTRIES</b>	181,500	183,000	181,100	-0.8	0.2
<b>Trade, Transportation, &amp; Utilities</b>	44,700	44,700	44,700	0.0	0.0
Trade	37,800	37,800	37,900	0.0	-0.3
Wholesale Trade	10,600	10,600	10,400	0.0	1.9
Wholesalers, Durable Goods	6,600	6,600	6,500	0.0	1.5
Wholesalers, Nondurable Goods	2,800	2,800	3,100	0.0	-9.7
Retail Trade	27,200	27,200	27,500	0.0	-1.1
Food & Beverage Stores	4,100	4,100	4,200	0.0	-2.4
General Merchandise Stores	5,800	5,700	5,900	1.8	-1.7
All Other Retail Trade	17,300	17,400	17,400	-0.6	-0.6
Transportation, Warehousing, & Utilities	6,900	6,900	6,800	0.0	1.5
Utilities	700	700	700	0.0	0.0
Transportation & Warehousing	6,200	6,200	6,100	0.0	1.6
<b>Information</b>	3,500	3,600	3,700	-2.8	-5.4
Telecommunications	1,400	1,400	1,300	0.0	7.7
<b>Financial Activities</b>	12,200	12,200	11,900	0.0	2.5
Finance & Insurance	9,200	9,200	8,900	0.0	3.4
Real Estate & Rental & Leasing	3,000	3,000	3,000	0.0	0.0
<b>Professional &amp; Business Services</b>	32,700	32,500	31,700	0.6	3.2
Professional, Scientific, & Technical	9,400	9,400	10,200	0.0	-7.8
Management of Companies & Ent.	7,000	7,000	6,900	0.0	1.4
Administrative & Support & Waste Mgmt.	16,300	16,100	14,600	1.2	11.6
<b>Educational &amp; Health Services</b>	27,800	27,600	27,100	0.7	2.6
Educational Services	2,000	1,900	2,300	5.3	-13.0
Health Care & Social Assistance	25,800	25,700	24,800	0.4	4.0
Hospitals	9,100	9,000	9,000	1.1	1.1
<b>Leisure &amp; Hospitality</b>	19,900	20,000	20,500	-0.5	-2.9
Arts, Entertainment, & Recreation	2,900	2,900	2,900	0.0	0.0
Accommodation & Food Services	17,000	17,100	17,600	-0.6	-3.4
Accommodation	2,000	2,000	2,000	0.0	0.0
Food Services & Drinking Places	15,000	15,100	15,600	-0.7	-3.8
Other Services	6,700	6,600	6,800	1.5	-1.5
<b>Total Government</b>	34,000	35,800	34,700	-5.0	-2.0
Federal Government	5,600	5,600	5,500	0.0	1.8
State & Local Government	28,400	30,200	29,200	-6.0	-2.7
State Government	12,600	12,700	12,400	-0.8	1.6
State Government Education	3,300	3,300	3,600	0.0	-8.3
State Government Administration	9,300	9,400	8,800	-1.1	5.7
Local Government	15,800	17,500	16,800	-9.7	-6.0
Local Government Education	8,600	10,000	9,400	-14.0	-8.5
Local Government Administration	7,200	7,500	7,400	-4.0	-2.7

\* Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

percent, from June to July 2003, while over the year, *Nonfarm Payroll Jobs* lost 2,100 jobs in the Boise City MSA. Month-over-month, *Goods-Producing Industries* gained 100 jobs; these gains were noted in *Natural Resources & Construction* (200 jobs), *Machinery Manufacturing* (100 jobs), and *Other Nondurable Goods Manufacturing* (100 jobs), while job decreases were noted in *Fabricated Metal Products Manufacturing* (-100 jobs), *Other Durable Goods Manufacturing* (-100 jobs), and *Food Manufacturing* (-100 jobs). Year-over-year, *Goods-Producing Industries* lost 2,500 jobs; losses occurred in *Natural Resources, Mining, & Construction* (-600 jobs), *Fabricated Metal Products Manufacturing* (-100 jobs), *Machinery Manufacturing* (-100 jobs), *Computer & Electronic Product Manufacturing* (-1,900 jobs), *Transportation Equipment Manufacturing* (-100 jobs), and *Printing and Related Support Activities* (-100 jobs). *Other Durable Goods Manufacturing* (200 jobs) and *Other Nondurable Goods Manufacturing* (200) were the only industries to experience job gains.

In *Service-Providing Industries*, job losses outweighed job gains with 1,500 jobs lost in the Boise City MSA from June to July 2003. Job losses occurred in *All Other Retail Trade* (-100 jobs), *Information Services* (-100 jobs), *Food Services & Drinking Places* (-100 jobs), *State Government Administration* (-100 jobs), *Local Government Education* (-1,400 jobs), and *Local Government Administration* (-300 jobs). The high number of jobs lost in *Education* is consistent with the end of the traditional school year in most districts. Job gains were experienced in *General Merchandise Stores* (100 jobs), *Administrative & Support & Waste Management Services* (200 jobs), *Educational Services* (100 jobs), *Health Care & Social Assistance Services* (100 jobs), *Hospitals* (100 jobs), and *Other Services* (100 jobs). Year-over-year, *Service-Providing Industries* gained 400 jobs, with job gains in *Durable Goods Wholesale Trade* (100 jobs), *Telecommunications Services* (100 jobs), *Finance & Insurance Services* (300 jobs), *Management of Companies & Enterprises* (100 jobs), *Administrative & Support & Waste Management Services* (1,700 jobs), *Health Care & Social Assistance Services* (1,000 jobs), *Hospitals* (100 jobs), *Federal Government* (100 jobs), and *State Government Administration* (300 jobs). Job losses were noted in *Nondurable Goods Wholesale Trade* (-300 jobs), *Food and Beverage Stores* (-100 jobs), *General Merchandise Stores* (-100 jobs), *All Other Retail Trade* (-100 jobs), *Information Services* (-200 jobs), *Professional, Scientific, & Technical Services* (-800 jobs), *Educational Services* (-300 jobs), *Food Services & Drinking Places* (-600 jobs), *Other Services* (-100 jobs), *State Government Education* (-300 jobs), *Local Government Education* (-800 jobs), and *Local Government Administration* (-200 jobs). The slow growth of jobs over the year is consistent with the downturn and slow recovery that

the national economy has been experiencing since January 2001.

## **SPECIAL TOPIC:**

### **Fall Semester Starts at Treasure Valley Colleges & Universities**

Fall marks the beginning of school for many colleges in the Treasure Valley. Many changes have occurred at these schools, and the following is an overview of some of the changes at these institutions.

- Boise State University welcomed its new President, Bob Kustra, and started construction on its first academic building on the Canyon County campus in mid-August. The new 65,000-square-foot building will house classroom instruction, science laboratory instruction, student services, a library, and a bookstore. When new buildings are constructed, the amenities may change. Completion of the building is expected by December 2004.
- Northwest Nazarene University (NNU) was again named one of the best universities in the Western Region by *U.S. News & World Report*. The report ranked NNU at number 30 in the top tier among master's-level universities in the west. NNU continues its 15-month MBA program and its accelerated business degree, the STEP program.
- Albertson College of Idaho (ACI) welcomed its new President, Robert Hoover, in August. ACI continues to be named one of the best 214 liberal arts colleges in the nation, ranked in the third tier by *U.S. News and World Report*. The school was also named as one of the nation's best 351 colleges (top 10 percent of all U.S. colleges and universities) by The Princeton Review, and was listed as a "Best Value" in the 2004 edition of "The Unofficial, Unbiased Guide to the 328 Most Interesting Colleges."

## **CONSTRUCTION IN SOUTHWEST IDAHO**

The number of new dwelling units built in Southwest Idaho during the first six months of 2003 was 3,580, up 19.2 percent from the first six months in 2002, as shown in Treasure Valley Table 3 on page 13. The number of permits issued during the same period for Southwest Idaho was 11,180, up 2.6 percent from the first six months of 2002. The only areas to experience decreases in the number of new units constructed were Nampa, Caldwell, and Emmett with decreases of 1.3 percent, 4.3 percent, and 19.8 percent, respectively. Increases in the number of new units constructed included Boise, Meridian, Mountain Home, Payette, and Weiser with 30.7 percent, 31.7 percent, 56.3 percent, 11.1 percent, and 25.0 percent, respectively. Boise, Nampa, and Emmett experienced decreases from 2002 to 2003 in the number of permits issued, while Meridian, Caldwell, Mountain Home, Payette, and Weiser

Treasure Valley Table 3: Construction in Southwest Idaho

	New Units			Total Permits		
	2002	2003	% change	2002	2003	change
Boise	541	707	30.7	7,099	6,959	-2.0
Meridian	492	648	31.7	804	1,109	37.9
Caldwell	371	355	-4.3	392	428	9.2
Nampa	830	819	-1.3	1,027	916	-10.8
Emmett	86	69	-19.8	201	163	-18.9
Mountain Home	48	75	56.3	142	155	9.2
Payette	9	10	11.1	33	45	36.4
Weiser	4	5	25.0	8	10	25.0
Unincorporated	622	892	43.4	1,195	1,395	16.7
<b>Total</b>	<b>3,003</b>	<b>3,580</b>	<b>19.2</b>	<b>10,901</b>	<b>11,180</b>	<b>2.6</b>

Source: Wells Fargo Idaho Construction Report, June 2003

experienced an increase in the number of permits issued. *New Units* refers to the number of residential units built, including single-family, multi-family, and mobile home units. *Total Permits* refers to the number of construction permits authorized for new residential, new nonresidential, and additions, alterations and repairs to existing buildings.

## AREA DEVELOPMENTS

### Boise City MSA

- The Hispanic Cultural Center of Idaho opened in Nampa on September 6. The 36,000-square-foot facility features several rooms to be used for lectures, classes, and training; a multipurpose community room that can accommodate up to 350 people; culinary classrooms; a computer lab; a gift shop; a gallery that will house artwork by local, national, and international artists; rooms where English and Spanish financial classes will be offered by Home Federal; and a library. At the grand-opening celebration, Dana Gioia, the National Endowment for the Arts chairman, spoke to supporters and the public who gathered to celebrate the opening.
- The Technology and Entrepreneurial Center (TECenter) on Boise State University's west campus in Nampa opened in September. The TECenter already has its first three start-up business clients and could eventually house up to 30 start-up companies. The TECenter is located in a 38,000-square-foot technology incubator. The first three TECenter incubator tenants are: Tiburon Corporation, a software development firm developing applications for specific industries; I.O. Dupont LLC, developers of proprietary technology for brake and shifter cabling applications; and Rohm University LLC, offering computer and business courses.

- Saint Alphonsus Regional Medical Center (St. Al's) announced in August that it would offer a new cancer treatment at the St. Al's Cancer Care Center in Caldwell. The Intensity Modulated Radiation Therapy (IMRT) is a more precise radiation technique and will be available to patients at St. Al's in Boise this fall and at St. Luke's in Boise and Meridian in January. The IMRT allows doctors to deliver high doses of radiation

directly to the cancer cells more precisely than with conventional radiation therapy. A 2002 study by the Memorial Sloan-Kettering Cancer Center of prostate cancer patients found that tumors of patients treated with IMRT were more likely to dissolve than with older radiation therapy techniques. Potentially, this could help many cancer patients.

- Jackson's Food Stores, Inc. announced in early August that it was negotiating with Steve Eddy to acquire several local Chevron stations and convenience stores. Both owners expect the potential transition to be smooth with the businesses remaining open and no job losses.
- The area surrounding Karcher Mall is growing quickly, with Lowe's and Home Depot constructing large home-improvement retail centers. Other construction announcements in the area include Big 5 Sporting Goods, which started construction at a new facility at Karcher Mall, and Golden Corral, which started construction on a new restaurant near the Edwards Theatres complex.
- In other recent business happenings in the Boise City MSA, Rusty's Drive Inn in Boise closed; Tom Scott Honda moved from Caldwell to a new dealership in Nampa; the Magical Treehouse consignment store moved from Nampa to Caldwell; Aca-pulco restaurant moved to a new spot in Karcher Mall near Jo-Ann Fabrics; construction started on The Willows, a new office complex in Caldwell; the Mona Lisa Fondue Restaurant in Nampa started expanding its current facility to include a banquet room; Craft Warehouse announced plans to open a 21,000-square-foot store in the Meridian Crossroads shopping center in late-October; Maria's 8-Ball Express opened in Nampa, Mountain West Bank announced plans to open a branch office in Kuna; Sonic announced plans to open a

new restaurant on Broadway Avenue in Boise; Piazza di Vino Art Gallery and Wine Bar will open on 9th Street in Boise later this year; Commercial Tire Inc. recently leased a 27,000-square-foot industrial building in Meridian where the business will move its headquarters; Mutual Materials Company announced plans to open a concrete paver plant in Boise in early 2004; and Walgreens announced plans to start construction on a new store near the intersection of Glenwood and State Streets in Garden City.

#### **Boise County**

- Bogus Basin Ski Resort is preparing for another season, and announced its fall schedule in late August. The mountain resort will be open seven days and five nights per week. Resort officials also announced that it would offer a discounted seasonal pass to people who missed out on the sale in the spring. In addition to the schedule changes, Bogus Basin will open a snow-tubing park that is expected to bring in about \$400,000 to \$500,000 annually.

#### **Elmore County**

- The annual Three Island Crossing re-enactment of the Oregon Trail pioneer efforts to cross the Snake River at Glens Ferry was held in early August. Thousands of visitors attended the annual celebration, hosted by the Three Island Crossing Organization (TICO). The celebration included an equestrian/pedestrian parade, a dance, a breakfast, and entertainment including presentations about the North American Fur Trade, performances by Native American dancers, and a variety of musical acts.
- Area residents attended an open house for TLK Dairy in August. Visitors were able to tour the facility and see the complete daily operations from the birth of calves through the milking of cows. The dairy features two milking parlors, which can milk more than 500 cows per hour. The dairy can accommodate 5,000 cows.

#### **Gem County**

- Black Canyon Partners, LLC purchased land on both sides of Shalerock Road and hope to start construction on a new planned community in spring 2004. The property plans include two public 18-hole golf courses, a residential area, an equestrian center, and trails for horseback riding, hiking, and off-roading. The project is expected to cost near \$60 million and should be completed in about ten years.

- In other recent business happenings in Gem County the new helipad opened at Walter Knox Memorial Hospital in Emmett, and Linda Jackson joined the Gem County Chamber of Commerce as its Executive Director.

#### **Payette County**

- The Vacuum Shop recently opened a second store at 19 North Main Street in Payette. The original Vacuum Shop in Ontario and the new location in Payette both sell new and used vacuum cleaners and sewing machines of all makes and models. The store also services and repairs vacuum cleaners and sells every brand of bags and belts.

#### **Valley County**

- McCall Memorial Hospital recently relocated its outpatient therapy services to the Marketplace in McCall. The new 3,600-square-foot space will accommodate growing demand. The hospital is currently remodeling the former therapy area to provide more room for the administration and radiology departments.
- In early August, the town of Yellow Pine hosted its annual Yellow Pine Harmonica Contest. About 4,000 visitors attended the festival that featured 25 harmonica players performing as soloists and in groups. The annual event is the second largest of its kind in the nation, and the \$6,000 that is raised by the annual festival will pay for upcoming roadwork and municipal projects.
- Lake Port Plaza in downtown McCall, formerly May Hardware, has been remodeled and held its grand opening over Labor Day Weekend. The plaza houses the offices of Lonesome Dove Construction, Fields and Hopkins Realtors LLC, North Star Log Systems, Brundage Residential Design, and Lake Port Bath & Body. Nonnie's on the Lake, a European café, will open in the plaza this fall.

#### **Washington County**

- Jim and Cora May Henney recently purchased Mel's Trading Post on East Idaho Street in Weiser, and renamed it the Henn House Trading Post. Mel and Joyce Baker, who sold the business to the Henney's after owning and operating the business for 23 years, are retiring.

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